

中国在全球猪肉行业的竞争力、风险和可持续发展

China within the Global Pork Industry
Competitiveness, Risk, and Sustainability

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Swine Industry Symposium

概要

Overview

中国在世界市场上重要性

Importance of China in the world market

竞争力

Competiveness

优势

Strengths

劣势

Weaknesses

计划

Projections

每年前七个月进口

Year to July Imports

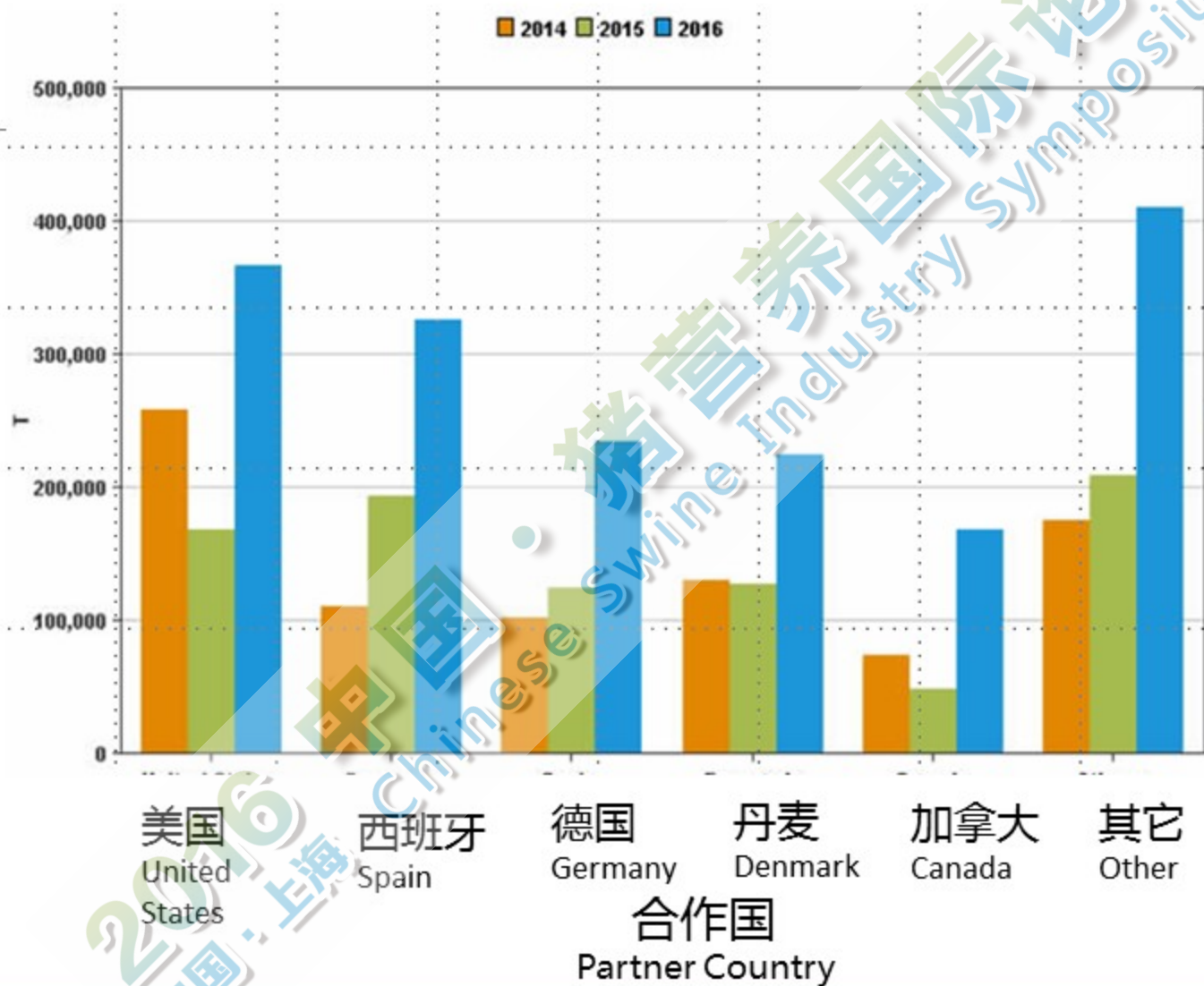


图1.中国猪肉产品进口 (左轴为价值)

Figure 1. Chinese Imports of Pork Products

(\$ value on left axis)



价值 (百万美元)

Value (\$ Million)

数量 (千吨)

Quantity (000 Tons)

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图2.总成本（欧元/千克活体重）

Figure 2. Total costs (Euro/kg hot weight)

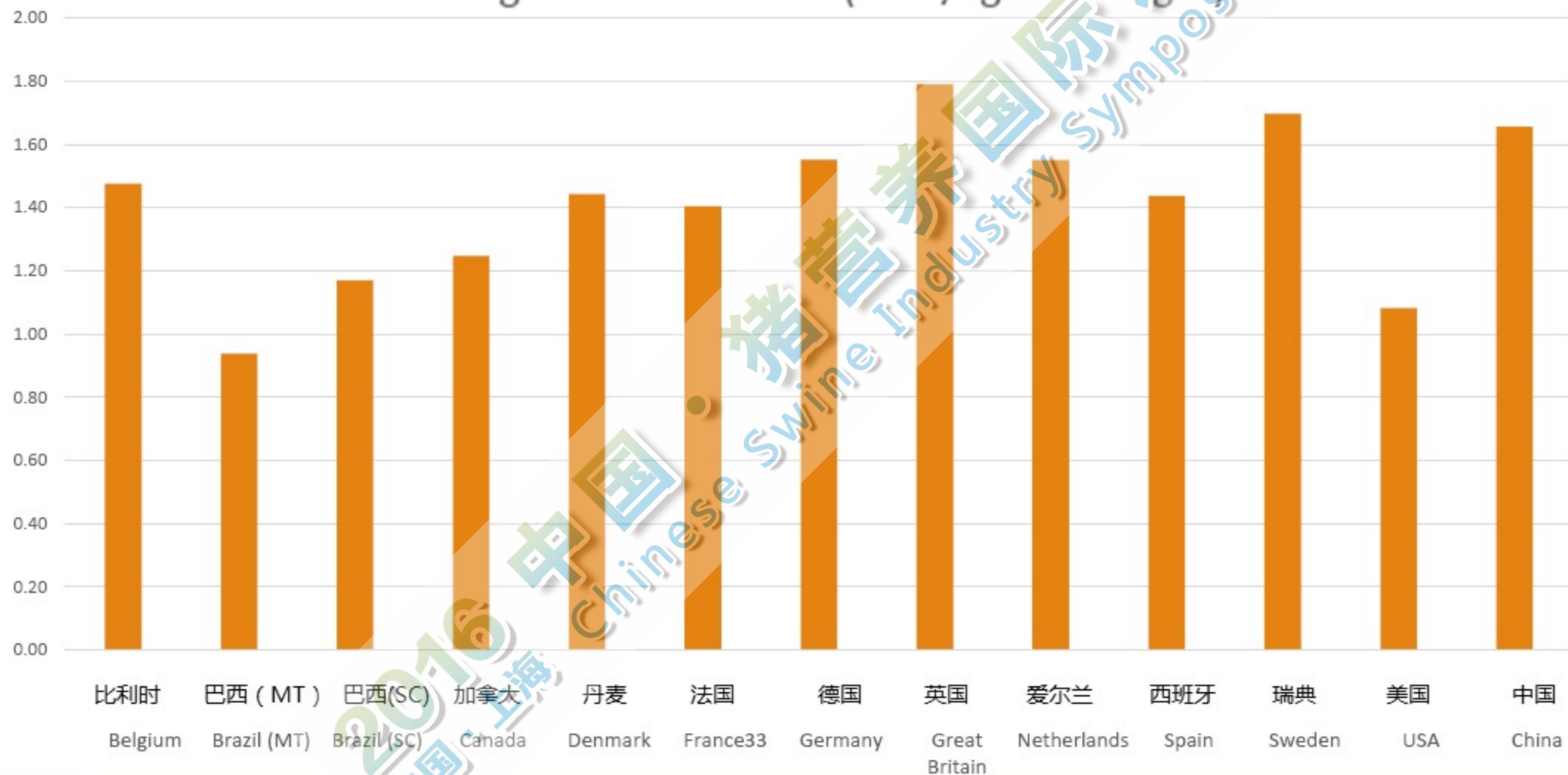
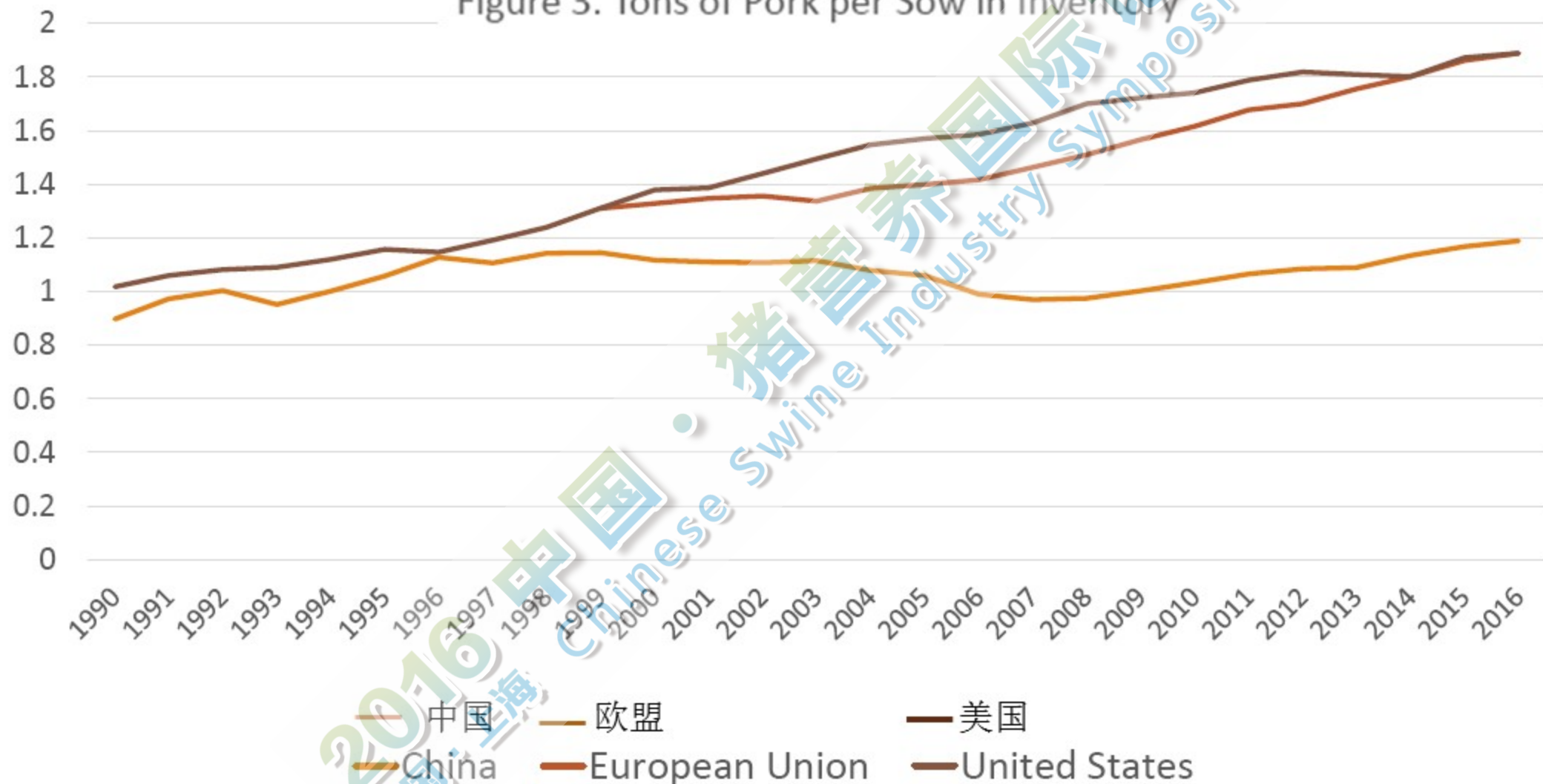


图3.每头存栏母猪提供猪肉量（吨）

Figure 3. Tons of Pork per Sow in Inventory



优势Strengths

巨大上升的消费潜力，实际人均消费只有27.5公斤，这大约是官方统计数据一半

Enormous upside consumption potential, actual consumption is only 27.5 Kgs per person, this is about half of the official statistic

进口猪肉中国收取12%-20%关税，不允许深加工猪肉进口，此外还有增值税

China charges a duty of 12% to 20% on imported pork and does not allow processed pork imports, this is compounded by VAT

政府提供了显著的直接补贴

Government provides significant direct subsidies

政府的许多人对自给水平低于95%感到不安，他们可能会采取措施防止进口超过5%

Many in the Government are uncomfortable with a self sufficiency level below 95% and they will probably act to prevent imports beyond that

劣势

Weaknesses

产业集中到沿海省份，和人口聚集过于集中导致疾病压力
coastal provinces and is too close to population centers Industry is concentrated into the

Concentration leads to disease pressure

某些地区的地方政府关闭猪厂以防止气味和水污染
shutting down facilities to prevent odor and water pollution Local government in some areas are

中国消费者重视特定减税，这将促使脚和耳朵类产品大量长期进口

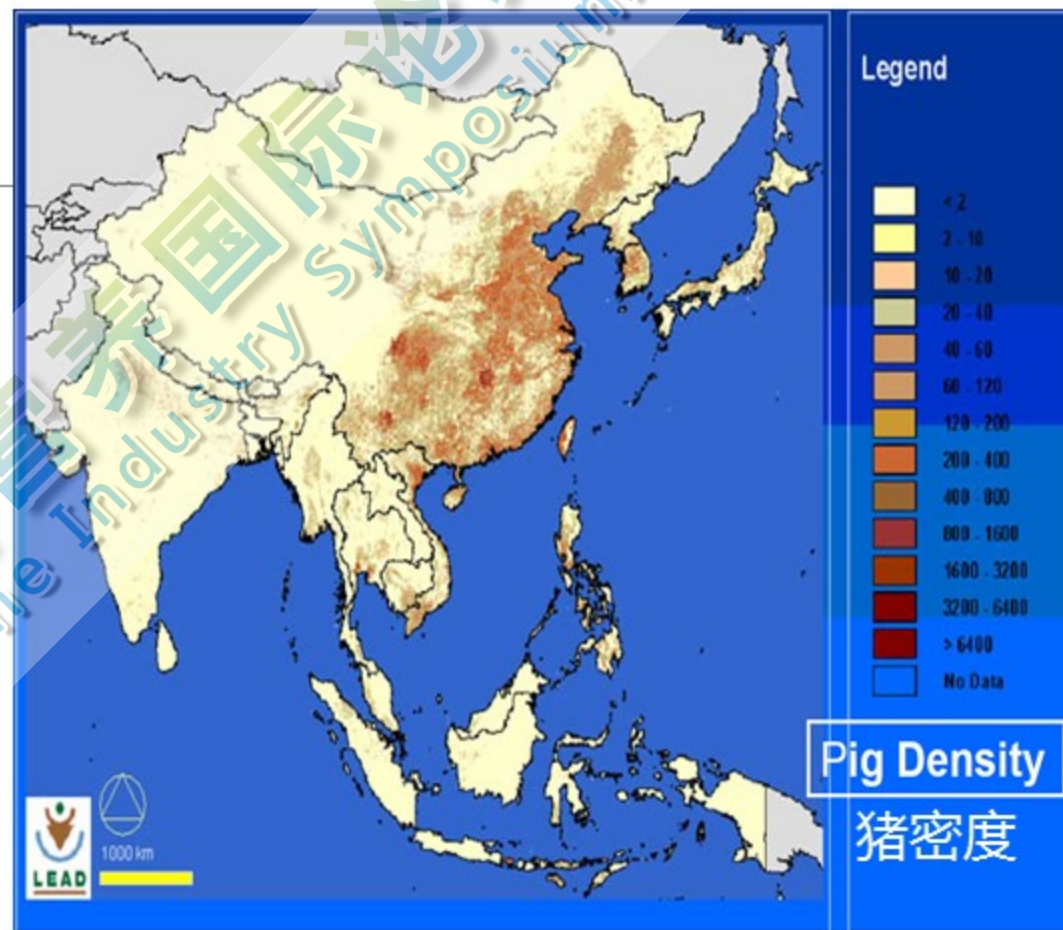
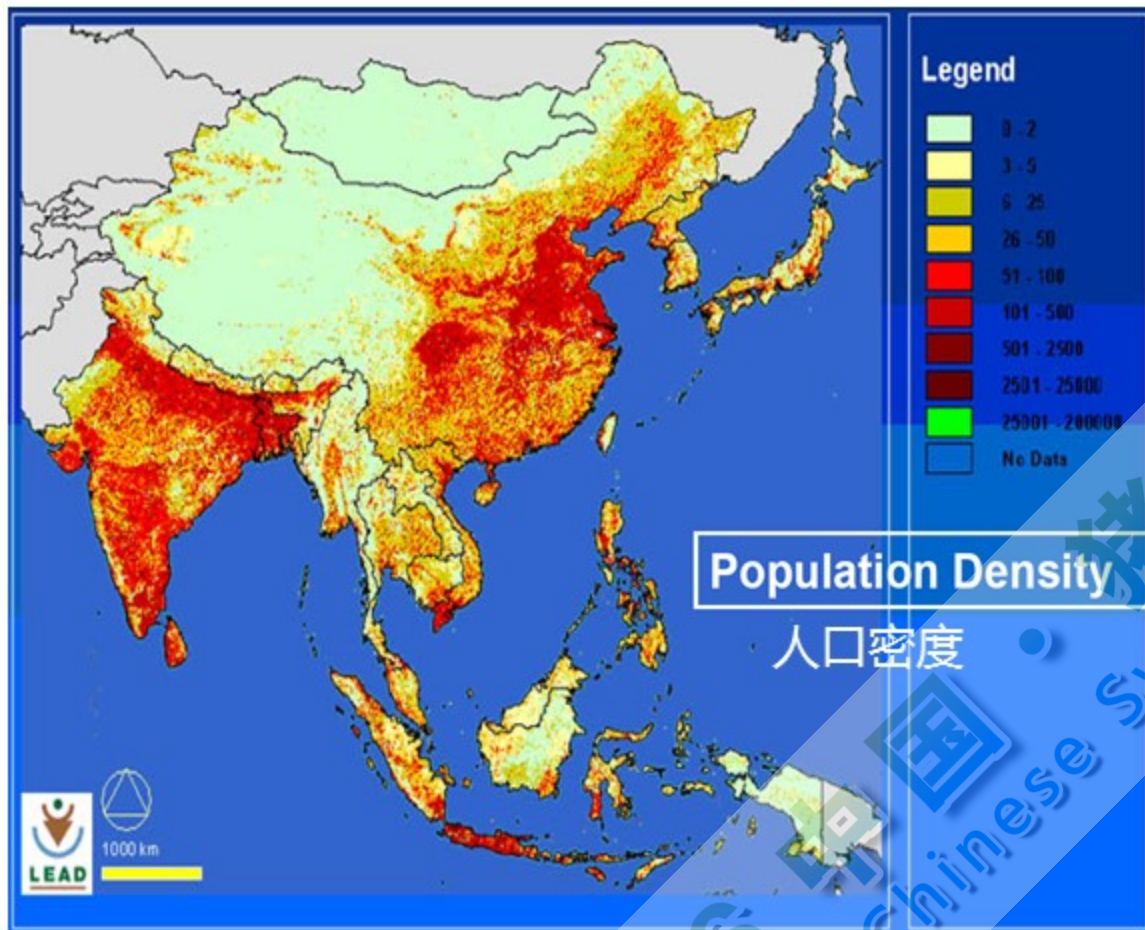
Chinese consumers place a premium on specific cuts such as the feet and ear, this will cause large and permanent imports of these products

中国的消费者很特别，他们愿意使用高价格的进口产品

Chinese consumers are unusual in that they are willing to pay a premium for imported product

CPI: 消费猪肉指数，在通货膨胀中如果猪肉价格上扬，将鼓励进口

CPI: Consumer Pig Index, if pork prices cause an uptick in inflation, imports will be encouraged



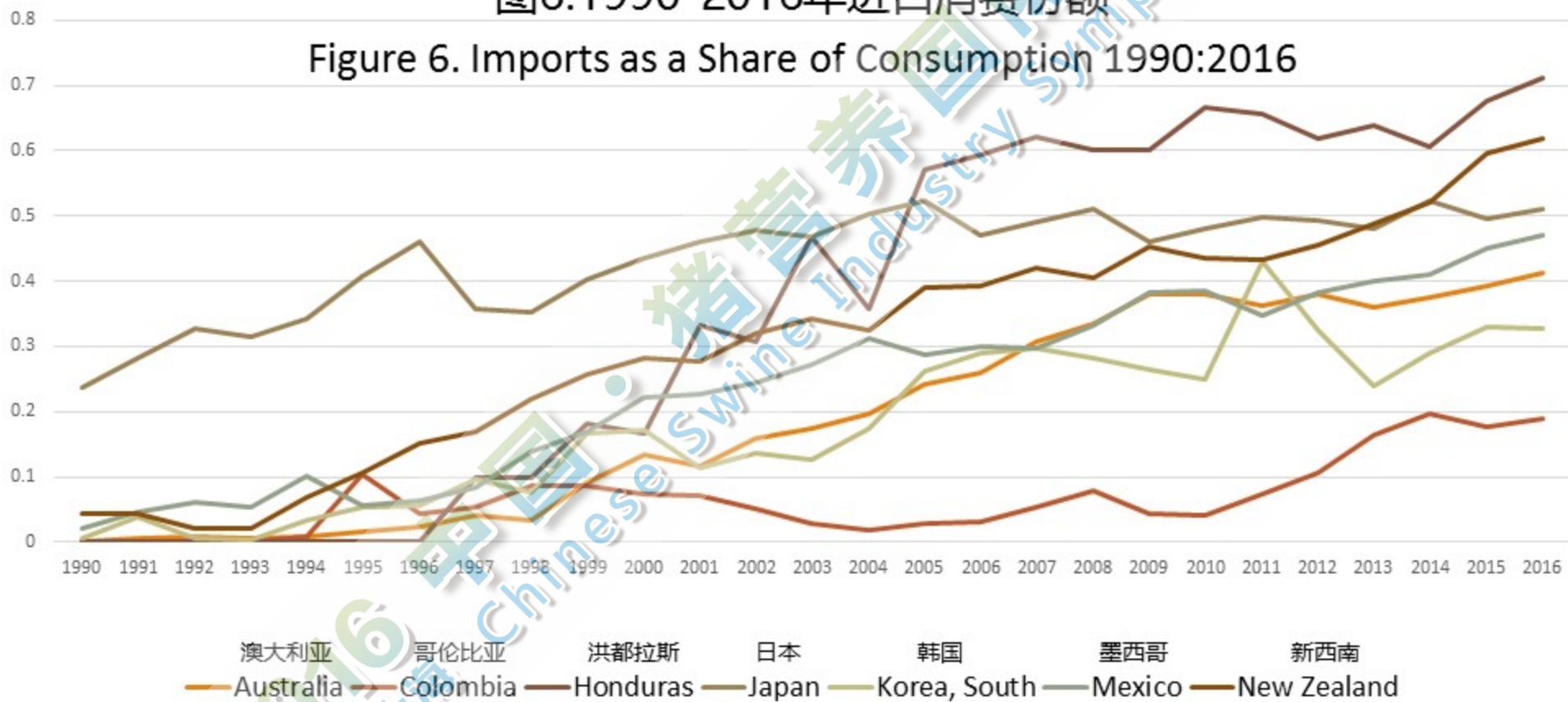
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图6.1990-2016年进口消费份额

Figure 6. Imports as a Share of Consumption 1990:2016



底线 Bottom Line

如果中国的猪肉产业可以解决其疾病和生产力的问题，它将可以与进口产品抗争

If the Chinese pork industry can address its disease and productivity problems, then it can compete against imported products

中国猪生产周期将影响其它国家，某些年份将进口大量的猪肉，将成为各种肉类持续进口国

China will export its pig cycle and import large quantities of muscle meats in some years and will be a continuous importer of variety meats

政府的支持是至关重要的，如果行业声誉受损或生产成本居高不下（不再有“河中猪”或非法化合物喂养的猪），政府支持的效果将大打折扣

Government support is critical but this will be eroded if the reputation of the industry is damaged or production costs remain high (no more “pigs in the river” or feeding of illegal compounds)

如果政府的支持减少，那么中国可能成为庞大猪肉进口国，这将需要长期合同

If government support is reduced, then China could become a massive importer of pork, this will require long term contracts

一点建议

A Suggestion

制定农场运行的自愿行业标准，该标准最大化食品安全、肉品质量和最小化动物福利、环境问题

(见美国PQS)

Set voluntary industry standards for on farm practices that maximize food safety and meat quality and minimize welfare and environmental issues

(See PQS in the US)

使用这个标准打造“中国产高品质猪肉”品牌

Use this standard to create a “High Quality Pork Made in China” Brand

从销售收入中筹集资金宣传产品特性

Advertise the attributes using funds collected from point of sale

排除不达标的猪肉生产者

Exclude pork from producers who do not meet high standards

英国退出欧盟和欧盟的难民危机

Brexit and the refugee crisis in the EU

英国已经是自由贸易协定背后重要推动力量，没有英国欧盟其它国家参加这些协定可能性小得多

The UK has been an important force behind free trade agreements and without it, the EU is much less likely to participate in these agreements

德国似乎不大可能让英国保持全面进入单一市场，除非英国愿意授予访问欧盟公民，这还没有明显的答案

It seems unlikely that Germany will allow the UK to maintain full access to the single market unless the UK is willing to grant access to EU citizens, there is no obvious answer here

一个可能的结果是欧盟猪肉很少有机会进入英国，反之亦然

A likely outcome is less access for EU pork in the UK and vice versa

英国可能愿意与美国和加拿大签署自由贸易协定的协议，这将打开美国和加拿大的产品市场

The UK might be willing to sign FTA agreements with the US and Canada, this would open the market for US and Canadian product

德国成功地将来自欧盟其他国家的移民整合到包装厂和养猪场，这有助于拓展德国猪肉行业

Germany has successfully integrated immigrants from other EU countries into packing plants and pig farms, this has helped the German pork industry to expand

但许多新移民都来自那些缺少猪肉行业国家，存在文化和语言障碍，这将使第二轮整合要困难得多

But many of the new immigrants are from countries that lack a pork industry and there are cultural and language barriers that will make a second round of integration much more difficult

跨太平洋伙伴关系协定的影响

Impact of TPP

如果没有跨太平洋伙伴关系协定，很可能是其他跨太平洋伙伴关系协定的国家将签订双边优惠协议

In the absence of TPP, it seems likely that other TPP countries will form bilateral, preferential arrangements

美国不能承担脱离跨太平洋伙伴关系协定的后果，因此它很可能在未来三年内的某个时候签署协议

The US cannot afford to lose access to TPP countries and thus it seems likely that the US will sign the agreement sometime in the next three years

跨太平洋伙伴关系协定将导致日本和越南猪肉产量逐渐减少，并适度增加消费，这将增加从美国，加拿大和智利的进口

TPP should result in a gradual reduction in pork production in Japan and Vietnam and a modest increase in consumption, this will increase imports from the US, Canada and Chile

像中国、欧盟和巴西这些国家除非加入跨太平洋伙伴关系协定，否则他们将处于劣势

Countries such as China, the EU and Brazil will be at a disadvantage unless they join

自由贸易协定的优惠是病毒性的

Preferential free trade agreements are viral

巴西

Brazil

巴西南部是不含口蹄疫，现在可以出口到无口蹄疫国家

Southern Brazil is free of FMD and can now export to FMD free countries

巴西南部的生产成本与美国和加拿大类似，巴西在俄罗斯市场利润丰厚，因此预计巴西猪肉产量逐渐增加

Production costs in southern Brazil are similar to the US and Canada, and Brazil has a lucrative market in Russia, so expect a gradual increase in Brazilian pork production

虽然巴西中西部生产成本非常低，但由于肉牛和野生动物混合，该地区已经有口蹄疫。即使基础设施问题可以解决，这也减少了玛多克罗索省出口的机会

Production costs in the Center West of Brazil are very low but the area has FMD due to comingling of beef cows with wild animals, this reduces export opportunities for Matto Grosso even if the infrastructural problems can be resolved

俄罗斯 Russia

俄罗斯禁止进口来自美国、欧盟和加拿大的猪肉，这在世界市场上产生了百万吨顺差，对于巴西和俄罗斯的猪肉生产商是个机会

Russia banned pork imports from the US, EU and Canada and this created a one million ton surplus on world markets and an opportunity for Brazilian and Russian pork producers

欧盟猪肉涌入亚洲，但大部分猪肉是亏本卖到的

EU pork flooded into Asia, but much of this product was sold at a loss

最近欧盟出口到中国的猪肉激增使欧盟养猪业恢复盈利

The recent surge in EU pork exports to China brought the EU pork industry back to profitability

美国在消除生产中使用莱克多巴胺的行动非常慢，这给了欧盟在中国的竞争优势

The US has been surprisingly slow to eliminate Ractopamine from production systems and this has given the EU a competitive advantage in China

俄罗斯已接近自给自足，一旦它控制非洲猪瘟，他们将自给自足

Russia is close to self sufficiency and will get there once it controls African Swine fever